



Massachusetts Teachers' Retirement Board

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MTRB Employer Bulletin

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eRetirement update

eRetirement is coming—Check **now** to see if you meet the minimum technical specifications

As reported last quarter, we are continuing the design and development of our new web-based information technology system—eRetirement—that will enable us to meet the extraordinary service demands of the retiring baby boomers.

The implementation of eRetirement in your school district is approximately a year away. When we go live, all of our employer reporting units—school districts, collaboratives and charter schools—will submit their monthly retirement deduction reports via the secure web application. The eRetirement system will process your reports, provide you with a status message via e-mail, and provide a secure web application for any error correction that may be necessary.

Employer reporting in the eRetirement system will be based on the various roles at the district level. Last quarter we asked you to begin to plan for the designation of the following roles in your system:

- MTRS Liaison
- Deduction Report File Submitter
- Deduction Report File Corrector

- Enrollment Validator
- Service & Salary Verifier
- Member Employment Status Updater

For a detailed description of each of these roles, please access last quarter's *Employer Bulletin* (Number 3, July 2003) online, at mass.gov/mtrb/4emp/41ann.htm.

At this time, we also want to share with you the following minimum technical specifications that you will need in your local offices in order to utilize the new eRetirement system. To ensure that you'll be ready to use eRetirement, please take a minute now to review the minimum technical specifications listed below.

If you anticipate any difficulty meeting these minimum specifications, kindly notify us. In order to help us keep track of your feedback, kindly send your notice via e-mail to empsup@trb.state.ma.us or in a letter addressed to our Employer Reporting unit at our Boston office. Please be sure to include your name, school district and contact information, and tell us which specifications you will not be able to meet. ■

Minimum technical specifications for eRetirement system

INTERNET ACCESS

Web browser Internet Explorer, version 6.1 or higher, or Netscape, version 6.0 or higher

Connectivity..... Minimum of 56K modem for dial-up (with Internet account), or cable modem, DSL or T1 line

Other..... E-mail account is required

OFFICE COMPUTERS

Processor

PC Pentium II or higher

Mac..... Power Mac G3 or higher

Operating system

PC Windows 95 and above

Mac..... OS 8 or higher

RAM..... 128MB or more

Screen resolution .. 800 x 600

Peripherals Printer is required

Thanks to you!

The MTRB's 2003 member enrollment campaign is working!

In an effort to ensure accurate and timely enrollments, the MTRB sent notices to each school district identifying the district's new employees—whether they were new MTRS members or current members new to the district. We asked each district to verify our information, to identify any other new hires, and to remind their new employees to enroll with the MTRS via our online enrollment tool. Overall, your response has been excellent. Thanks to your efforts, we have experienced a notable increase in member enrollments since our mailing. To date, we have enrolled over 4,000 new members and have records for over 2,000 members who have changed school districts.

The information that members provide us via the online enrollment tool helps us to ensure that their contributions are credited properly, that our beneficiary information is current, and that new hires with previous membership service in another Massachusetts contributory retirement system have an opportunity to elect into the R+ Program.

We are reviewing and updating all of our new member information with complete and accurate data. At times, we may contact you to clarify contribution rates, membership eligibility, and other related information that we rely on you to certify. Our goal is to maintain accurate member records and limit our demand on your time and efforts. Timely and accurate deduction reporting, along with a continued commitment to direct new employees to our enrollment tool, will help us achieve that goal.

We appreciate your support with this important effort. If you have any questions or concerns, we encourage you to contact **Tom O'Connell** (617-878-2865) or **Andrew Coughlin** (617-878-2894) in our Member Services Department. ■

Couldn't attend? Access the materials online! MTRB employer training programs a success

In August, the Massachusetts Teachers' Retirement Board concluded its 2003 employer programs. More than 420 people, representing 245 school districts attended.

This year, the programs were divided into two sessions: a retirement primer and a general session. The new format was received favorably. In fact, many of you suggested that we continue to offer programs that are geared specifically toward less experienced payroll officials.

During the retirement primer, our staff reviewed the basics:

- eligibility for membership,
- contribution rate determination, and
- the online enrollment process.

The general session was devoted largely to the monthly retirement deduction report, with an emphasis on the treatment of changes in teachers' employment status, and a

description of the calculations used to verify the accuracy of each deduction record. This was the first time that the employer training program addressed these topics in such precise detail. We hope that you now have a better understanding of the format and data accuracy standards that the MTRB requires of all of our employer reporting units.

According to those who attended the programs, the most valuable part of this year's program was the eRetirement update. Our staff was able to preview what implementation of eRetirement will mean for all of you.

Imagine submitting your monthly retirement deduction reports via a secure web application. The system then will validate the file format and data submitted for accuracy, consistency and completeness. If this analysis detects no critical errors, then the data will merge with the MTRS membership database and the contributions will be posted to our members' accounts. In the event that a report fails validation, within 24 hours, the employer will receive notification *via* email. Error messages will instruct you what problems need to be addressed and you will be given the opportunity to correct the errors online. While our employer reporting units enjoy the accuracy and efficiency of an online reporting system, the MTRB will be better able to manage the increase in demand for retirement services caused by the "Baby Boomers."

If you were unable to attend one of the employer training programs, you may access the program guide on our website at www.mass.gov/mtrb. The booklet (pdf format, 48 pages) contains the PowerPoint slides and other reference materials that you may find helpful. ■

Reminder—

R+ accelerated payment plans limited to one year

Currently, the accelerated payment tool for all members retiring on or before June 30, 2004 is available online. In July, we activated the tool for members retiring during the 2004-2005 school year. The tool will limit the length of the plan to twelve months from its inception. For example: An employee wishing to retire on December 31, 2004 will be able to commence accelerated payments on January 1, 2004. You may set the plan up earlier (say, November) for the January start date but the accelerated payment schedule cannot exceed 12 months.

Also, we suggest that you establish a plan that ends the month prior to retirement. Often, salaries or earnings change, resulting in a balance due or overpayment. This is discovered when our office attempts to reconcile the received contributions with the expected contributions.

Finally, please submit salary schedules, supporting contractual language, and individual administrator contracts along with the signed accelerated payment plan agreements. This will allow us to review the accuracy of the plans much earlier and resolve any issues that may arise.

If you have any questions or concerns, please don't hesitate to contact our Employer Reporting unit, at 617-878-2895, or our Member Services unit at 617-878-2890. ■